IJG Daily Bulletin

Monday, 14 October 2024



NSX Overall 1855 25.72 1.41 -2.28 13.57 1933 102 Japan Industrial Production (Aug F) NSX Local 684 -0.04 -0.01 0.22 1.77 690 44 ISE ALSI 86149 756.63 0.89 -0.46 12.04 87803 69128 ISE Top 40 78007 638.44 0.83 -0.64 10.66 79719 63312 ISE INDI 118410 299.00 0.25 -1.16 14.17 122263 92852 ISE FINI 21233 360.40 1.73 0.00 18.80 21735 15313	Local Indices								The Day Ahead		
SX Overall 1855 25.72 1.41 2.28 13.57 1933 107 Auge of the state of the sta		Level	Net Change	d/d %	mtd %	ytd %	52Wk High	52Wk Low			
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Safe 300											
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Level Last Change Last % mtd % ytd % 52Wk High 52Wk Low ANE 899 0.00 0.00 0.00 899 899 GCP 1966 0.00 0.00 15.99 2000 1650 FNB 4647 0.00 0.00 1.73 20.20 470 3880 500 topped 5,800, nothing its 45th MOC 757 0.00 0.00 0.13 -0.53 850 717 NAM 72 0.00 0.00 0.00 2.86 72 70 interest income. At Wells Fargo NIIS NME 222 0.00 0.00 0.00 2.22 220 134 the firm expects that drop to be lest last quarter. Each stock rose at least the right signe NIIS the KBW Bank Index to the highest si Chinese shares erased a drop to adv trading as investors weighed th measures announced by the Finan revive the economy. The ons SNO 896 -1.00 GC24 8.13 -1.00 500 S123 9.51 88.22 1.00 GC26 8.13 -1.00		83.00	-0.55	-0.66	1.37	-9.29	107.00	68.88			
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Market Wrap

6m traded on the NSX on Friday with N\$22.6m h of Standard Bank Group and N\$2.4m worth SG Konsult exchanging hands. On the local se N\$2,240 worth of SBN Holdings traded n 1c. No ETF/ETN trades were recorded.

Market Wrap

FTSE/JSE Africa All Share Index rose 0.9% to 49.45 as 99 stocks gained, 21 fell, and 3 were anged. Karooooo rose 5.9%, DRDGOLD gained and Emira Property Fund climbed 4.3%. ngela Resources fell 3.0%, Rainbow Chicken ped 2.9% and Coronation Fund Managers ned 2 3%

national Market Wrap

Street kicked off the earnings season stocks hitting all-time highs as big banks ed after posting solid results. The S&P topped 5,800, notching its 45th record in 2024. organ churned out a surprise increase in net est income. At Wells Fargo NII slumped — but firm expects that drop to be less steep in the quarter. Each stock rose at least 4.4%, pushing (BW Bank Index to the highest since April 2022. ese shares erased a drop to advance in volatile ng as investors weighed the impact of sures announced by the Finance Ministry to e the economy. The onshore equities chmark rallied as much as 1.7%, while Hong stocks and US futures slipped. The yuan ned along with oil.

	2022	2023	2024
GDP (y/y)	4.6%	4.2%	3.1%*
Inflation (y/y)	6.9%	5.3%	3.2%*
PSCE (y/y)	3.9%	1.9%	2.3%*

		0050	11.	25	20	4.50		
								*forecast
IJG Indices and Interest Ra	ates (%)					MPC	Meeting Calendar fo	or 2024
	Level	Net Change	d/d %	mtd %	ytd %	BoN	SARB	FOMC
IJG Money Market Index	281.494	0.062	0.022	0.287	6.636	14 Feb	25 Jan	31 Jan
IJG All Bond Index	371.444	0.570	0.154	0.117	12.667	17 Apr	27 Mar	20 Mar
WIBAR Overnight	7.188	-0.065	-0.896	-0.139	-2.575	19 Jun	30 May	01 May
WIBAR 3m	7.319	0.000	0.000	-2.165	-8.01	14 Aug	18 Jul	12 Jun
SA Repo Rate	8.00					23 Oct	19 Sep	31 Jul
SA Prime Rate	11.50					04 Dec	21 Nov	18 Sep
NAM Bank Rate	7.50							07 Nov
NAM Prime Rate	11.25							18 Dec

Source: Bloomberg, NSX, JSE, Numerco, IJG Securities

International News

US PPI rose 1.8% y/y in September, as per the Bureau of Labour Statistics.

UK Manufacturing Production rose 1.1% m/m but fell 0.3% y/y in August, as per the Office for National Statistics.

UK Industrial Production rose 0.5% m/m but fell 1.6% y/y in August, as per the Office for National Statistics.

Germany CPI remained steady m/m and rose 1.6% y/y in September, as per the Federal Statistical Office.

Local News

N\$250 - million road rehabilitation project commences at Walvis Bay. The Municipality of Walvis Bay has signed a N\$250-million agreement with the Roads Authority (RA) and the Road Fund Administration (RFA) for a road rehabilitation project. The project will be implemented in three phases over a five-year period. The RA will be responsible for the overall project management, with funds provided by the RFA. The contractor of the project is Otesa Civil Engineering, while Tulipamwe Consulting Engineers will be responsible for its supervision. Construction activities are due to create about 120 temporary jobs across all three phases. – The Namibian

Dimension Data Namibia rebrands to Mach 10 under 100% O&L ownership. The Ohlthaver & List Group (O&L) has announced the rebranding of Dimension Data Namibia to Mach 10 after acquiring 100% of the business in March this year. "Dimension Data Namibia's evolution into Mach 10 is not just a rebrand; it symbolizes a new era of possibilities. Our vision is to offer world-class digital transformation services delivered by a local team that understands the unique needs of Namibian businesses. The name Mach 10 embodies speed, power, and the relentless pursuit of excellence by going beyond boundaries, making the seemingly impossible a reality. That is our commitment—helping businesses thrive in a digitally driven world," said Annalize Van der Merwe, Mach 10 Managing Director. – The Brief

Namibia's mining sector called to leverage electricity single-buyer model. The Electricity Control Board (ECB) has called on Namibia's mining industry to take advantage of the Modified Single Buyer Market Model as a strategy to reduce electricity input costs. The call comes as electricity remains a significant operational expense for mines in the country, and energy security remains a concern. According to ECB CEO Robert Kahimise, large mines such as Rössing Uranium have already begun taking advantage of the model, which allows them to self-supply up to 30% of their energy needs at a reduced cost. He said the model is particularly beneficial for mines, which are classified as "contestable customers" in the modified system. – The Brief

Afrieximbank aims to penetrate Namibian market. The African Export-import Bank (Afreximbank) says it hopes to penetrate the Namibian market by hosting its 2024 Trade Finance Seminar and Factoring Workshop in Windhoek next month. This will be the 24th edition of the seminar that will bring African bankers, financiers, legal practitioners, insurers, professionals from regulatory agencies, and corporates from across the continent and from other countries involved in trade finance together from 5 to 8 November. Afreximbank's managing director for trade finance and correspondent banking, Gwen Mwaba, says the bank chose Namibia because it is one of the countries yet to host the seminar in Southern Africa. – The Namibian

Trade Ministry seeks increased participation of MSMEs in beverage industry. The Ministry of Industrialisation and Trade is pushing for greater involvement of micro, small and medium enterprises (MSMEs) in Namibia's beverage industry. This follows the launch of local production of Lion Lager by Anheuser Busch InBev (AB InBev) in Okahandja. As part of the broader strategy to enhance local production, Minister of Industrialisation and Trade Lucia lipumbu encouraged AB InBev to engage with local suppliers and service providers, fostering inclusive economic participation. – The Brief

SA Economic News

South African Revenue Service cracks down on crypto with new tax rules. In an update shared over the country's news agency, the South African Revenue Service (SARS) has called taxpayers to declare their digital currencies and other crypto assets through its Voluntary Disclosure Programme (VDP). Given the increasing popularity of digital assets like Bitcoin and Ripple's XRP among South Africans, the agency's latest move isn't surprising. Also, many have expected the tax policy following the Financial Sector Conduct Authority's decision to declare crypto as a financial instrument.

Company News

AVI faces competitive pressure as house brands rise. AVI, a major player in SA's consumer goods sector, is grappling with mounting pressure from competitors that threaten its profitability and market position. The company is at a crossroads, battling to navigate markets dominated by house brands while leveraging its strong portfolio to maintain market relevance. Its recent financial performance highlights both resilience and vulnerability in an evolving retail space and consumer preferences. – Business Day

Bell Equipment flags 25% fall in HEPS as market conditions take a toll. Bell Equipment, a designer, manufacturer and distributor of heavy industrial machinery, has flagged that its profit for the year to end-December is expected to fall by at least a quarter. Headline earnings per share (HEPS) are expected to be at least 25% lower than the 798c reported in the prior period, the group said in an update on Friday, citing the effect of weak market conditions on production volumes and sales. – Business Day

Coronation plans to lift black ownership to 51%. Coronation Fund Managers plans to implement BEE transactions that will lift its level of black ownership to 51%. The company already has a verified 31% level of black ownership, with R263bn, or 42%, of total assets under management (AUM) being managed by black employees, the group said in a statement on Friday. – Business Day

As subscribers decline, **MultiChoice** begins disrupting itself. MultiChoice is under tremendous strain. Subscriber numbers are, for the first time, in structural decline. In the year to March 2024, it saw drops in not only its Premium segment (DStv Premium and DStv Compact Plus, down 8%) but also in its mid-market (DStv Compact, down 9%) and mass market segments (down 2%). The latter, which offers entry-level packages costing as little as R29 per month, has been growing relatively strongly for years and has helped the pay-TV operator offset declines at the top end. This reversed in the last year as higher interest rates, a stagnant economy and an explosion in other viewing options (many of which are free) hit the business. Overall, subscribers are down 5% in South Africa – nearly half a million accounts. It has also been distracted by anything but pay TV, given that it has known for years that the market would turn ex-growth. – Moneyweb

Zeder posts half-year loss. Agribusiness-focused investment holding company Zeder, which has been making headway in its strategic disposal programme, has reported an interim loss as volatile weather patterns and lower soft commodity prices hammer the industry. The group reported a R77m loss before tax from ongoing activities for the six months ended August, compared with a R51m profit in the previous comparable period. – Business Day

SADC News

Zimbabwe central bank boss says ZiG devaluation was a 'once-off'. Zimbabwe sought to assure citizens that its gold-backed currency would not suffer another steep devaluation, and steps were being taken to assure its defence. "It was a once-off," Reserve Bank of Zimbabwe Governor John Mushayavanhu told the state-owned Zimbabwe Broadcasting Corporation in an interview posted on X. "We expect things to stabilize going forward and should start to see prices fall."

Source: Bloomberg, Reuters, The Namibian, Namibian Sun, Republikein, New Era, The Brief, Business Day, Moneyweb, News24, Mining Weekly

Equities

Overall Index

Ticker	Shares Traded	Current Price (c)	Net Change	d/d %	mtd %	ytd %	52Wk High	52Wk Low
ANE		899	0	0.00	0.00	0.00	899	899
ANM		52844	306	0.58	-5.49	11.61	64496	39830
B2G		5428	132	2.49	-0.75	-7.66	6444	4524
CGP		1966	0	0.00	0.46	15.99	2000	1650
FNB		4647	0	0.00	0.00	-5.18	5200	4600
FST	1,885	8220	238	2.98	-1.04	11.82	8903	5913
IVD	3,296	13413	160	1.21	2.24	6.80	14294	9963
KFS	132,706	1811	11	0.61	-0.71	17.98	1875	1390
LHN		470	0	0.00	1.73	20.20	470	388
ММТ		2952	42	1.44	0.17	34.86	2973	1970
мос		757	0	0.00	0.13	-0.53	850	717
NAM		72	0	0.00	0.00	2.86	72	70
NBK		29635	465	1.59	-0.88	37.05	30900	19649
NBS		2899	0	0.00	0.17	-7.94	3659	2894
NHL		222	0	0.00	0.00	0.00	222	220
OCE		6940	77	1.12	0.58	-1.80	7603	6500
ОММ	4,986	1277	6	0.47	-6.79	-2.22	1388	1000
ORY		1280	0	0.00	0.00	6.67	1280	1190
PNH		1268	0	0.00	-0.08	6.11	1270	1194
SILP		12801	0	0.00	0.00	0.09	12801	12790
SLA	726	8738	30	0.34	-0.70	20.03	8943	6265
SNB	93,962	24180	480	2.03	-0.23	16.19	25042	16666
SNM		37336	186	0.50	1.46	30.29	37336	26801
SNO	250	896	-1	-0.11	0.79	6.04	955	756
SRH	678	29097	96	0.33	-1.63	5.79	31337	22717
TRW	488	10770	370	3.56	-1.19	44.86	11191	6878
тто		36	-1	-2.70	-7.69	-28.00	84	5
VKN		1855	39	2.15	1.59	31.37	1882	1200

Source: Bloomberg, NSX, IJG Securities

Local Companies: Dividends

Ticker	Last Declared Dividend (c)	Dividend Type	T12M DY (%)*	Last Day to Trade	Payment Date
ANE	-	-	0.00	-	-
CGP	64.00	Final	5.54	27 September 2024	18 October 2024
FNB	180.16	Final	7.61	04 October 2024	25 October 2024
LHN	39.89	Interim	16.19	01 November 2024	22 November 2024
мос	33.82	Interim	9.59	13 June 2024	05 July 2024
NAM	6.00	Final	8.33	01 December 2023	14 December 2023
NBS	52	Interim	1.79	28 October 2024	15 November 2024
NHL	26.00	Final	15.56	20 October 2023	30 October 2023
ORY	51.50	Final	8.05	27 September 2024	18 October 2024
PNH	10.00	Interim	1.18	19 April 2024	17 May 2024
SILP	402.00	Final	3.14	13 June 2024	05 July 2024
SNO	68.00	Interim	14.06	06 September 2024	27 September 2024

* Calculated as the sum of the ordinary dividend per share amounts that have gone ex-dividend over the past 12 months, divided by the last closing price.

Local Companies: Important Dates

Ticker	Upcoming Event	Date	Additional Info
FNB	Annual General Meeting	17 Oct 2024	Etosha Boardroom, FirstRand Namibia Ltd, 5th Floor, @Parkside, 130 Independence Avenue, c/o Fidel Castro, Windhoek and via electronic media
CGP	Annual General Meeting	30 Oct 2024	The boardroom on the sixth floor of Capricorn Group Building, Kasino Street, Windhoek or virtually via Lumi platform
ORY	Annual General Meeting	25 Nov 2024	Maerua Rooftop, Maerua Mall Office Tower, corner of Jan Jonker and Robert Mugabe Avenue, Windhoek

Exchange Traded Funds

Ticker	Volume Traded	Current Price (c)	Net Change	d/d %	mtd %	ytd %	52Wk High	52Wk Low
ENXPLD		17732	-17	-0.10	8.85	-11.34	21673	15222
ENXGLD		44824	114	0.26	2.02	20.56	45009	34731
ENXPLT		16411	88	0.54	0.78	-8.78	18909	15406
SXNNAM		2343	0	0.00	0.00	12.37	2343	1803
NGNGLD		42887	93	0.22	1.94	20.51	43082	33254
NGNPLD		18009	156	0.87	9.60	-9.86	21690	15384
NGNPLT		16299	101	0.62	1.04	-8.72	18758	15293
SXNEMG		6340	-21	-0.33	0.51	8.67	6493	5233
SXNWDM		9390	-3	-0.03	2.61	12.13	9503	7344
SXNNDQ		20043	-17	-0.08	2.73	12.61	21275	15149
SXN500		10645	-28	-0.26	2.36	14.87	10867	8120

Exchange Traded Notes

Ticker	Volume Traded	Current Price (c)	Net Change	d/d %	mtd %	ytd %	52Wk High	52Wk Low
ALETCN		2068	2	0.1	0.6	8.7	2544	1669
AMETCN		1147	6	0.5	3.3	14.9	1312	793
APETCN		1920	-12	-0.6	-0.1	10.2	2094	1496
BHETCN		2394	27	1.1	2.5	21.2	2569	1875
FAETCN		2073	-18	-0.9	4.2	52.3	2145	1130
MSETCN		1990	-14	-0.7	-1.1	3.3	2361	1692
MWETCN		1652	-3	-0.2	1.8	10.9	1691	1298
NFETCN		1408	-10	-0.7	4.1	38.0	1438	750
TSETCN		1581	-146	-8.5	-13.2	-19.3	2048	1098
SRETCN		1432	-5	-0.3	1.1	10.9	1473	1104

DevX & OTC

Ticker	Shares Traded	Current Price (c)	Net Change	d/d %	mtd %	ytd %	52Wk High	52Wk Low
BMN		3859	-7	-0.2	3.9	13.2	5769	2314
CER		13	-1	-7.1	-7.1	-18.8	19	11
DYL		1671	-43	-2.5	2.8	21.0	2169	1117
FSY		862	14	1.7	-10.2	-17.9	1565	581
EL8		447	-16	-3.5	-5.5	-20.7	831	313
AGR	74,003	371	0	0	0.00	17.4	371	312

Fixed Income

Treasury Bills

Next Auction Date: 17-Oct-24

Tenor	Weighted Avg. Yield* (%)	Last Change (bps)	Highest Yield Allocated* (%)	Bid-to-Offer
91-Day	8.082	-0.05	8.132	0.98
182-Day	8.123	-2.27	8.139	1.82
273-Day	8.177	-0.87	8.197	1.58
365-Day	8.166	-0.97	8.188	1.47

Source: Bank of Namibia

*Nominal yields from the most recent government treasury bill auction.

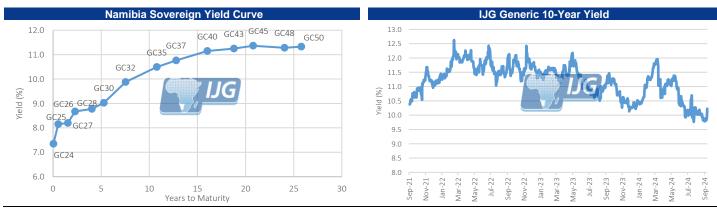
Government Bonds

Government Bond Auction	ns
ext Auction Date:	14-Oct-24

Commentary on Previous Auction:

Bond	YTM	Benchmark	Benchmark YTM	Spread (bps)	All-In-Price	Coupon Rate	Next Coupon
GC24	7.318	GT364/18Oct24	7.318	0	99.920	10.50	15-Oct-24
GC25	8.127	GT363/17Apr25	8.127	0	100.092	8.50	15-Oct-24
GC26	8.125	R186	8.135	-1	100.432	8.50	15-Oct-24
GC27	8.595	R186	8.135	46	100.692	8.00	15-Jan-25
GC28	8.711	R2030	9.120	-41	99.206	8.50	15-Oct-24
GC30	8.960	R2030	9.120	-16	97.933	8.00	15-Jan-25
GC32	9.819	R213	9.505	31	95.624	9.00	15-Oct-24
GC35	10.435	R209	10.515	-8	96.280	9.50	15-Jan-25
GC37	10.690	R2037	10.740	-5	94.056	9.50	15-Jan-25
GC40	11.088	R214	10.805	28	90.345	9.80	15-Oct-24
GC43	11.235	R2044	11.110	13	92.779	10.00	15-Jan-25
GC45	11.343	R2044	11.110	23	90.490	9.85	15-Jan-25
GC48	11.242	R2048	10.995	25	89.644	10.00	15-Oct-24
GC50	11.289	R2048	10.995	29	93.760	10.25	15-Jan-25
GI25	4.000				153.652	3.80	15-Jan-25
GI27	4.470				117.052	4.00	15-Oct-24
GI29	4.642				135.740	4.50	15-Jan-25
GI33	5.222				123.846	4.50	15-Oct-24
GI36	5.646				117.160	4.80	15-Jan-25
Eurobond 2	5.807	10YUSBond	4.100	171	101.881	5.25	29-Oct-24
NAM04	9.545	R186	8.135	141	103.698	10.51	01-Feb-25

Source: Bloomberg, Bank of Namibia, IJG Securities



Source: IJG Securities, BoN, Bloomberg

Corporate Bonds

Fixed Coupon Bonds	YTM	Benchmark	Benchmark YTM	Spread (bps)	All-In-Price	Coupon Rate	Next Coupon
NEDX2030	8.135	GC25	8.127	1	101.924	10.21	28-Feb-25
BWFL26	8.235	R186	8.135	10	104.175	8.8	04-Dec-24
Floating Coupon Bonds	YTM	Benchmark	Benchmark YTM	Spread (bps)	All-In-Price	Coupon Rate	Next Coupon
BWJ1e27	10.192	3 month JIBAR	8.042	215	101.516	10.40	19-Nov-24
BWJ2e27	8.042	3 month JIBAR	8.042	0	101.516		19-Nov-24
DBN29				-		8.25	
	10.442	3 month JIBAR	8.042	240	101.203	10.63	30-Nov-24
NEDJ2028	10.792	3 month JIBAR	8.042	275	101.330	10.98	28-Nov-24
ORYJ25	10.542	3 month JIBAR	8.042	250	101.595	10.75	18-Nov-24
BWJL25	8.942	3 month JIBAR	8.042	90	101.054	9.39	02-Dec-24
SBNA26	9.412	3 month JIBAR	8.042	137	101.246	9.60	25-Nov-24
SBKN26	9.482	3 month JIBAR	8.042	144	99.948	9.77	13-Oct-24
SBNG25	9.432	3 month JIBAR	8.042	139	100.152	9.43	05-Jan-25
SBNG27	9.732	3 month JIBAR	8.042	169	100.156	9.73	05-Jan-25
SBKN27	9.192	3 month JIBAR	8.042	115	100.891	9.38	07-Dec-24
BWJf26S	9.542	3 month JIBAR	8.042	150	101.053	9.73	02-Dec-24
LHNS01	10.992	3 month JIBAR	8.042	295	101.690	11.20	17-Nov-24
LHN02	10.842	3 month JIBAR	8.042	280	100.350	10.85	29-Dec-24
PNJ25	10.742	3 month JIBAR	8.042	270	100.768	10.93	16-Dec-24
PNJ26	11.292	3 month JIBAR	8.042	325	100.744	11.48	18-Dec-24
PNJ27	11.292	3 month JIBAR	8.042	325	100.805	11.48	16-Dec-24
PNJ29	10.742	3 month JIBAR	8.042	270	100.710	10.93	18-Dec-24
FNBJ25S	9.492	3 month JIBAR	8.042	145	100.465	9.52	23-Dec-24
FNBJ27S	9.772	3 month JIBAR	8.042	173	100.479	9.80	23-Dec-24
GDW26	10.242	3 month JIBAR	8.042	220	101.098	10.43	03-Dec-24
GDW28	10.542	3 month JIBAR	8.042	250	101.128	10.73	03-Dec-24





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